

THE COMMUNITY READINESS UNIT SERVICE GUIDE
For AIR FORCE SPACE COMMAND
FAMILY SUPPORT CENTERS

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15 December 2003

Prepared for:

U.S. Air Force Space Command Family Matters
Under contract: F05604-03-P-0257

FOREWORD

This Guide is a major part of our plan to help Family Support Center staffs develop and offer consistent services to unit leaders, members and families at our installations. This work reflects Air Force Space Command's response to Air Force guidance that FSC work/life services should be integrated and offered in multiple settings. We have always seen ourselves as partners with unit leaders in serving DoD members and their families; the following guidance will help us become even more effective in this vital role of serving and supporting the people who rely on us.

This Guide is not an instruction but a carefully crafted framework to design, implement and assess the services that we render to unit leaders and their people. FSC Flight Chiefs will customize this strategy as they examine their own bases, resources and the concerns reflected in their communities and units. However, the overall design expressed in this Guide should be carried out and lessons learned from local experiences should be shared across the command.

This Unit Service Guide reflects only one part of a comprehensive community readiness strategy. In addition to working actively and collaboratively with unit leadership, FSC staffs will serve their communities through 1) an integrated customer service strategy, 2) a collaborative interagency strategy, and 3) a community development strategy that will promote informal systems of support for DoD members and their families. Together, these strategies will allow us to more directly affect the readiness and retention of our service members and promote our national security.

We are grateful that the design of this Guide has been a joint effort from the very beginning. Dr. Dennis Orthner and Dr. Gary Bowen have spearheaded and consolidated the work and Air Force Space Command Flight Chiefs and staffs have been engaged in the design work through every stage. We are grateful for the insights from those who took the time to read through the drafts of the Guide and offer recommendations for improvement.

Now it is time to implement the concepts and practices outlined in this Community Readiness Unit Service Guide. Air Force Space Command leadership is behind this approach and will fully support its implementation and success. My staff and I are personally committed to making unit service a success in this Command.

Nancy J. Brewer
Chief, Family Matters
Air Force Space Command

15 December 2003

ACKNOWLEDGEMENTS

This Guide epitomizes the spirit of a results-driven community capacity approach. Its development was collaborative in every sense of the word, and its contents reflect the shared responsibility and collective competence of many people. Ms. Nancy J. Brewer, Chief, Family Matters, provided the leadership and vision for the Guide—she simply made it happen. She called for a “user-friendly” guide that will provide Family Support Center professionals with information and tools for strengthening their partnership with unit leadership. Ms. Brewer kept our eyes focused squarely on the horizon but our feet firmly planted on the ground as we worked on this Guide. She also made the project fun and engaging, and she ensured that the Family Support Center (FSC) Flight Chiefs would have an opportunity to provide input into the guide’s development.

Ms. Brewer’s staff at Air Force Space Command (Tracy Dockum, Betty Schuster and Senior Master Sergeant (sel) Bob Frohnepfel) was instrumental in all phases of the guide’s development. They provided expert consultation in helping to conceptualize the Unit Service Strategy Flow Model, and they greatly influenced the organization and design of the Guide. We greatly appreciate how quickly they turned around answers and information to our many requests, as well as their kindness in always making us feel appreciated and valued as members of the Air Force Space Command team. This is one of the hardest working and most competent staffs in the Air Force.

We are also appreciative of the partnership we enjoy with the AFSPC Family Support Center Flight Chiefs: Patricia (Tricia) Czepiel, Dr. John Foley, Sara (Sally) Galligan, Mark Gumbiner, James (Jim) Headstream, Glenn Simms, Emma Terrell, Ray Nishikawa and Kimberly Yates. This outstanding group of family life professionals was willing to roll up their sleeves and get the job done. The Flight Chiefs provided critical input and advice on every section and subsection of the Guide, and we appreciated their willingness to have staff members from their Family Support Centers provide critical review of an earlier draft of the Guide. We simply could not have completed the job without their expert consultation and assistance. We also appreciate the valuable input from Sheryl McCullen, the Deputy Mission Support Squadron Commander at Patrick Air Force Base, and Chief Master Sergeant Cathy Redmond who joined the Flight Chiefs when we met together in Colorado Springs to review the Guide.

Last but not least, we would be remiss if we failed to acknowledge the leadership and contribution of Ms. Barbara Murray, Chief, Force Sustainment Division, and Ms. Linda Smith, Chief, Office of Family Matters, to this overall effort. Both Ms. Murray and Ms. Smith have fully supported and encouraged the development of this Guide. They exemplify in their day-to-day work the collaborative spirit that is the cornerstone of the community capacity model and the bedrock of the Community Readiness Unit Service Strategy.

We hope that this Guide is more than a good reading; we hope that it makes a real difference in helping to prepare Family Support Center professionals to effectively coordinate and deliver FSC services to units.

Dennis Orthner
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December 2003

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GLOSSARY

Community (or Installation) Capacity – The collaborative ties among unit leaders, agency personnel, and community associations and informal groups that promote a sense of shared responsibility and collective competence for addressing personnel and family concerns and promoting the safety and well-being of community members.

Evaluation – A set of methods and strategies for determining the outcomes and impacts of planned intervention and prevention activities.

Indicator – A concrete marker or metric of an activity or result that is capable of being directly assessed or measured.

Monitoring – A special type of evaluation used to determine if services were actually implemented as planned, and whether the services or activities were implemented in the correct sequence and on time.

Partnership – A collaborative working relationship in which people and organizations combine their talents and resources to achieve results that are beyond the capacity of any single person or organization.

Performance Standard – A desired level for a result, which is typically expressed as a number, rate or proportion, that is associated with successful performance.

Result – The outcome of an activity or service in which a change in behavior, knowledge or attitude is demonstrated by the population group targeted.

Results Management – A decision management and resource allocation strategy to map the path of influence between identified needs, intervention activities and targeted outcomes.

Unit Liaison – FSC staff member with responsibility for providing unit service.

Unit Resources – A community infrastructure of agencies, organizations, groups, and people that can be mobilized to assist unit leaders in responding to the concerns of unit personnel and families and promoting their safety and well-being.

Unit Service – A partnership between unit leadership and the Family Support Center in which an FSC staff member (Unit Liaison) works directly with unit leaders in developing strategies to effectively address the concerns of unit personnel and families.

Unit Service Plan – A plan developed by a Unit Liaison and unit leadership that specifies the results to be achieved for the unit and the services and activities to be provided by unit leadership, Family Support Center, and, if applicable, other agencies and unit/base support groups that are designed to achieve these results.

Unit Strengths – The resources, capabilities and assets of unit leaders and unit personnel and families associated with successful unit performance.

THE UNIT SERVICE GUIDE

This Guide provides instruction on how your FSC can implement the unit service strategy at your installation. The information is designed to assist the Unit Liaison – the FSC professional who will coordinate and deliver FSC services to units at your installation. However, other FSC staff may want to read this Guide to better understand how units will be served and the collaboration necessary among FSC staff to serve units effectively. This Guide has four primary objectives:

- Define and describe the tasks of implementing the unit service strategy, including supporting tasks
- Describe the role and responsibilities of the Unit Liaison – the FSC professional performing this function on behalf of the FSC
- Provide tips and guidance to help the Unit Liaison perform key tasks
- Outline critical steps for getting ready.

In addition, several tools are provided in the text and Appendix to help the Unit Liaison (and your FSC) perform the assessment, planning, and evaluation tasks.

This is one of two Guides that are designed to assist you in implementing the unit service strategy. For guidance about implementing FSC direct services to unit members, consult [The Community Readiness Customer Service Guide for Air Force Space Command Family Support Centers](#). The Customer Service Guide provides a flow model for working directly with FSC customers, whether they are offered services within the FSC or at another location, such as the unit. By providing services directly to people in a similar manner, no matter the location, the FSC will be viewed as a stable and reliable partner in achieving the results for unit personnel.

PART 1: OVERVIEW OF FSC UNIT SERVICE STRATEGY

Why is the unit service strategy important to the Air Force?

The FSC's mission is to offer services that provide information, improve skills and offer short-term support and assistance that will help personnel and their families deal with the competing demands of the military mission and their family responsibilities. The FSC develops, delivers and coordinates services designed to educate and develop the competencies of personnel and families that will enhance well-being and readiness/retention. However, reaching personnel and families, especially prior to issues occurring, can be challenging. Outreach efforts are critically important.

The FSC assists commanders and other unit leaders on personnel and family issues through a unit-based service delivery approach. This outreach approach is based on two important assumptions:

- 1) Individual or family concerns often first appear or become known at the unit level and thus unit leaders value assistance that can enhance their capability to address these issues
- 2) Units are where service members and families initially establish their support system and sense of belonging. This means that working with units provides better access to members and families in the installation community.

Unit leaders today are dealing with greater unpredictability and greater demands as they face an expanding and dynamic military mission. As a result, the FSC, Air Force units and military communities must build and combine their respective capacities to successfully address work/life and mission readiness issues and thereby increase community readiness. The unit service strategy is one way to achieve this goal. The emphasis is on building the capacity of the unit and its leadership to effectively meet individual and family challenges and concerns and enhancing the FSC's efforts to partner with the chain of command in supporting unit members and families. A carefully crafted strategy that promotes FSC professionals' involvement with Air Force people at the work place is both timely and strategically important.

What are the key features of the unit service strategy?

Under the unit service strategy, the FSC will plan, implement and evaluate services at the unit level through face-to-face interactions and partnership with leadership. Four key features distinguish this strategy:

- FSC staff reach out and work directly with units
- FSC services/activities are based on 1) service member and family strengths and, 2) concerns identified by units and through evaluation results
- FSC services/activities give priority to prevention and early intervention efforts; other key players and agencies will be brought in to help design and support plans and activities
- FSC staff assists unit leaders in addressing critical personnel and family concerns and issues.

What are the goals of the unit service strategy?

The purpose of the unit service strategy approach is to create partnerships with unit leaders to identify unit strengths and address concerns and issues that impact readiness and retention. The unit service strategy is designed to achieve results in three areas: 1) unit leadership, 2) the FSC and 3) the community.

Unit Leadership. By assisting unit leadership through information, planning, and other support, unit leaders are expected to demonstrate the following knowledge, attitudes and skills:

- Recognize emerging concerns of unit members and spouses, including civilians, members from other services, and family members
- Display skills and competencies in addressing work/life issues
- Have knowledge about FSC resources available to assist them and their people
- Value and effectively use the full complement of base and community resources
- Develop skills in working collaboratively with others to plan services and activities that promote outcomes for the members and families in their unit.

The Unit Service Goal

The purpose of the unit service strategy approach is to create partnerships with unit leaders to identify unit strengths and address concerns and issues that impact readiness and retention.

FSC. By planning and implementing its efforts in partnership with unit leadership, the FSC will achieve the following results:

- Have a connection with each military unit
- Offer a visible FSC staff member for unit chain of command on FSC services and activities
- Increase working knowledge of issues that compromise unit performance and understand the extent to which services are addressing unit issues and concerns
- Develop multi-skilled FSC staff members and thus cost effective utilization of resources
- Demonstrate increased flexibility in responding to changing and emerging needs of families/communities
- Become a results-based family support system.

Community. By getting others involved in the process of addressing individual and family issues, the installation will experience a number of positive results:

- Receive better coordination of services
- Receive services designed to address targeted unit personnel and family concerns
- Demonstrate increased capacity to solve personal and family issues before they become crises
- Experience higher levels of personal and relational competence and greater satisfaction with the military and its lifestyle
- Demonstrate higher levels of readiness and retention.

Who is responsible for providing unit service?

The unit service function of the FSC is a primary duty of the Community Readiness Consultant. However, the FSC Flight Chief may assign other FSC staff to perform this function. The title or role of a “Unit Liaison” is assigned to all individuals who perform this function.

What is the role of the Unit Liaison?

To meet the needs of units, the Unit Liaison serves and works in a variety of capacities and plays a number of roles, including:

- Representative of the FSC
- Consultant on work/life issues and community services
- Partner in planning and facilitating services and support to units and enhancing community readiness
- Collaborator to incorporate the expertise and services of others
- Facilitator to assist others in their efforts
- Monitor to ensure services are delivered as planned
- Evaluator to assess needs and effectiveness of services.

The performance of these roles is critical to the successful implementation of the unit service strategy. Unit Liaison responsibilities include the following six unit service tasks:

- Task 1: Establish a relationship with your units (Engagement)** – establish collaborative working relationships with the chain of command within your units to jointly assess unit issues and concerns and plan, implement and evaluate services for the unit
- Task 2: Assess unit concerns, strengths and resources (Assessment)** – conduct an assessment for each unit to obtain information on the issues of concern and ways issues have been addressed in the past
- Task 3: Co-develop a unit service plan (Planning)** – develop unit service plans with unit leadership and with input from other key individuals/groups to define desired results and services needed for units you serve
- Task 4: Implement and monitor unit service plans (Implementation)** – facilitate the implementation of unit service plans by developing, providing or coordinating the delivery of FSC services, assisting unit leaders, and monitoring services and activities to address issues of concern
- Task 5: Evaluate results for the unit and its people (Evaluation)** – obtain and analyze data to assess the effectiveness of services/activities provided
- Task 6: Sustain a unit support and resource network (Sustainment)** – collaborate with other Unit Liaisons, FSC staff, and agencies and community groups to facilitate the delivery of services needed by units.

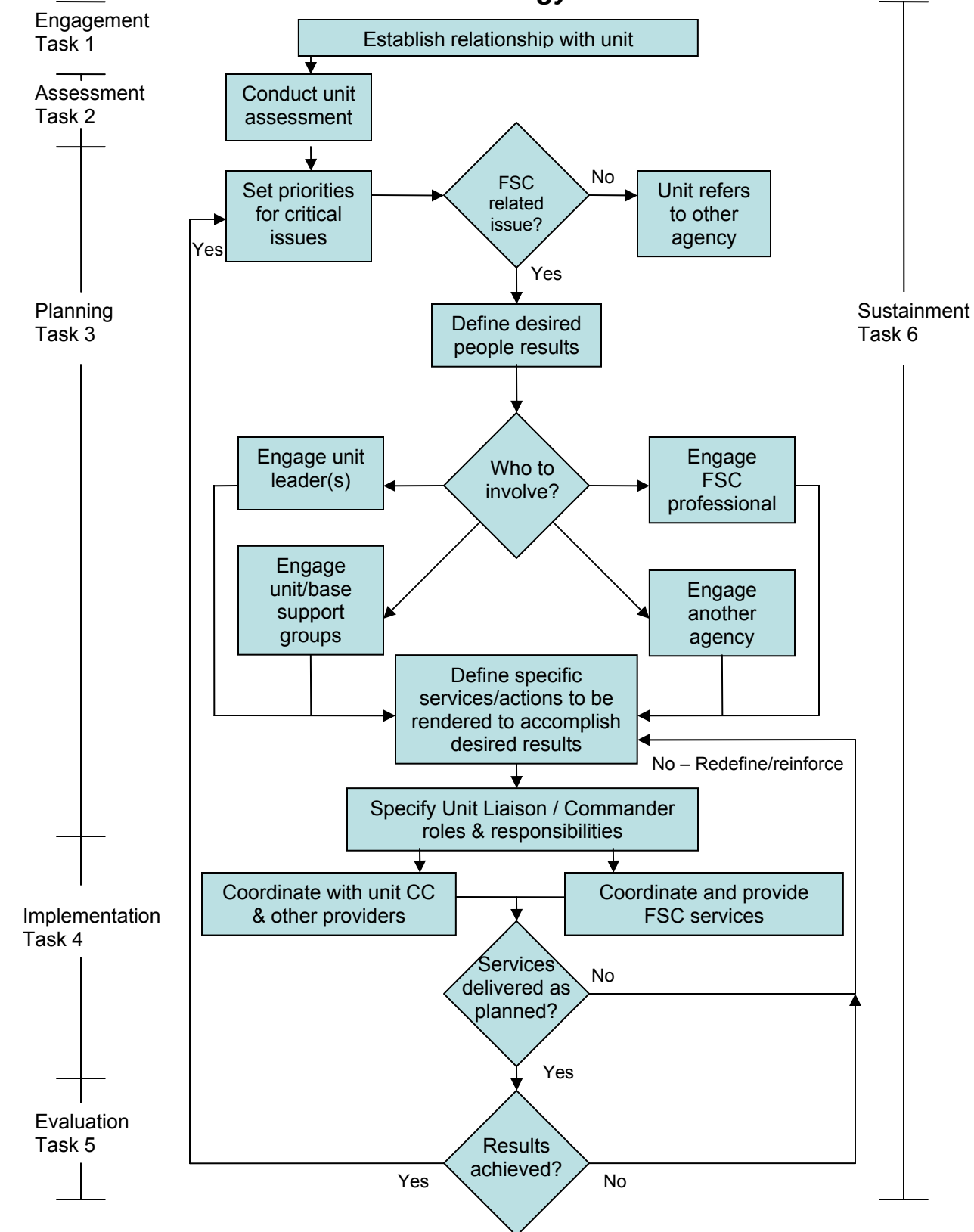
Part 2 of this Guide provides step-by-step guidance on how to perform these tasks.

PART 2: PROVIDING UNIT SERVICE

This section of the Guide describes the six unit service tasks and provides guidance on their implementation. For each unit assigned, you will be responsible for carrying out the following six tasks:

- Task 1: Establish a relationship with your units (Engagement)
- Task 2: Assess unit concerns, strengths and resources (Assessment)
- Task 3: Co-develop a unit service plan (Planning)
- Task 4: Implement and monitor unit service plans (Implementation)
- Task 5: Evaluate results for the unit and its people (Evaluation)
- Task 6: Sustain a unit support and resource network (Sustainment).

A graphic flow model is provided on the next page for Tasks 1 through 6. This model highlights the basic tasks you will need to carry out in partnership with your unit leadership. The Unit Service Strategy Flow Model shows the many steps you will take from conducting your unit assessment (Task 2) through determining if you have achieved the results for the people in the unit that you and your unit leaders had planned (Task 5). As depicted in the flow model, Task 1, Engagement, and Task 6, Sustainment, are continuous processes – you are always working to maintain a partnership with your unit and its leaders and to sustain your unit resource network.

AFSPC Unit Service Strategy Flow Model

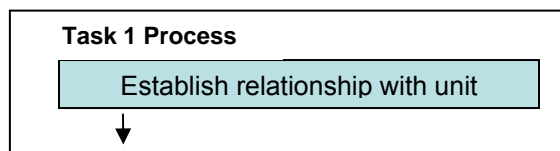
Although the six unit service tasks are presented as a sequential process, their execution is ongoing and continuous. As you might anticipate, some tasks will have to be repeated before you get to the end (i.e., evaluation) and some tasks will require more time than others. Thus, you will need to implement the process flexibly, and you might already be thinking of several reasons for assuming a flexible stance:

- The best laid plans do not always work out so you will have to go back to assessment and/or planning when an implementation strategy is not working
- Unit leaders will rotate over time, thus engagement with the unit will be an ongoing process as leaders come and go
- Sustaining your relationships with unit leadership and your agency partners will require ongoing effort.

In helping your unit overcome the latest contingencies, you will need to continually monitor and assess situations (i.e., what are the issues seen, what is working and not working, what results are being achieved or not achieved). In keeping your finger on the pulse, you will be able to help the unit to determine the focus and priority of its efforts.

TASK 1: ESTABLISH A RELATIONSHIP WITH YOUR UNITS

The relationship that you establish with your units will form the foundation for your long-term partnership with unit leadership. It will also influence how you and unit leadership are able to work together on the unit service process. Your goal is to form a partnership in which you and unit leadership can work collaboratively to address unit issues and concerns. The first step is to meet with squadron leadership, which is described below. Following the meeting, you will then proceed to work with unit leadership on the unit service process. Various steps are provided for sustaining leadership involvement in the process.



Although working together on the unit service process will help you form a relationship with unit leadership, you will need to take deliberate steps to develop this relationship into a true partnership. For this reason, important information about partnership relationships is presented as a separate discussion.

Meet with squadron leadership. Your FSC Flight Chief is responsible for contacting your unit and scheduling a meeting with squadron leadership. Either your FSC Flight Chief or a more experienced FSC staff member will accompany you to the initial meeting. The following topics should be addressed and discussed in this initial meeting with unit leadership:

Suggested Topics for Initial Meeting with Squadron Leadership

- What is the FSC's organizational mission and what are its priority service areas?
- What are the objectives of the Unit Service Strategy?
- What is your role and what services will you provide?
- How can unit leadership contribute to the success of the partnership?
- What methods will be used to keep in contact (e.g., briefings, telephone, e-mail, meetings, etc.)?
- What are the next steps, and what support is needed from the unit?

This initial meeting is important for two reasons. First, it allows you to make contact with the unit and become known in the squadron. Secondly, you begin the process of garnering support from senior leadership for your role and services. This is essential if you will be working with unit leaders lower in the chain of command who are more likely to be receptive to you if they have heard about it from their boss.

TIP

You are more likely to gain access to and get support from squadron leadership if the FSC Flight Chief has briefed installation leadership and group commanders on the unit service strategy at a Wing Stand Up.

Work with and sustain unit leadership involvement in the unit service process. Following the initial meeting with the unit commander, and any subsequent meetings with other members of unit leadership, you are responsible for coordinating the process of addressing work/life and community readiness issues in the units. This process begins with assessing unit concerns, strengths and resources (**Task 2**). Once you have identified unit challenges and assets, you will work with unit leadership to develop a unit service plan for responding to the challenges that are the priority concerns of unit leadership and that fit within the FSC's organizational mission (**Task 3**). Once the plan is implemented, you are responsible for ensuring that appropriate services are provided (**Task 4**) and evaluating service effectiveness (**Task 5**). Unit leadership input and participation are essential to the successful performance of these tasks. A detailed discussion on each of these tasks is provided in separate sections. (See graphic of the Unit Service Strategy Flow Model.)

There are a number of steps you can take to sustain unit leadership involvement in the unit service process:

- Keep unit leadership involved and up-to-speed about progress on unit assessment, implementation and evaluation tasks (these tasks are discussed later). Even though leadership will provide input on these tasks, you need to keep leadership informed. A combination of formal and informal methods will need to be used. The form of communication used will depend upon the content of the communication, the type of response needed from chain of command and unit leaderships' preferred method(s) of communication. Ways to communicate include:
 - E-mails (Tip: keep short and focus on the key question or response that is required)
 - Formal meetings (Tip: schedule ahead and send agenda before arriving)
 - Informal meetings (Tip: conduct short meetings on a specific topic with clear action requirements)
 - Briefings (Tip: keep short and present good data/information to make requests for support or to provide a status report on services and activities)
 - Telephone (Tip: state purpose clearly at beginning and schedule follow-up if more time is required)
 - Documents/Reports (Tip: keep as short as possible with follow-up actions/recommendations clearly stated).
- Respond to requests. To assist units when they seek help from you demonstrates your commitment and reinforces your image as a resource to unit leadership. **A “can do” attitude is absolutely necessary.** When “can’t do” or “can’t do now” is necessary, apologize and explain why and offer help in finding assistance from others.
- Provide ongoing support. To assist units on a long-term basis, you will need to repeat the entire “unit service strategy” process (Tasks 2-5) or specific components as necessary. The unit service plan must be dynamic rather than static! Repeating the entire process will be necessary to address new or changing unit priorities. This means that it is essential for you to:
 - Actively monitor all the services being rendered
 - Provide those services that are compatible with your skills and competencies
 - Conduct new unit assessments on a regular schedule
 - Update and/or create new unit service plans as needed
 - Coordinate services with on- and off-base agencies.

- Sustain leadership support. Several activities will support this outcome:
 - Provide regular updates to squadron leadership
 - Acknowledge leadership support in meetings and briefings
 - Meet with new commanders and NCOs in the context of command turnover.

TIP

Ask outgoing leaders to introduce you to incoming leaders. Remember your knowledge of and association with the unit can be helpful in easing the transition of the new leader and a way in which you can provide valuable support. Include your FSC Flight Chief in the initial meeting with a new leader.

Develop a partnership with your units. Although providing support to units (as specified in Tasks 2-5) is the primary focus of your efforts, you will need to build, expand and sustain a working partnership to assist units effectively. Although unit leaders will learn who you are and what you can do through your ongoing interactions, a collaborative relationship takes time to establish. Sustaining the collaboration will also take effort. Your actions and your words will form the basis of your credibility and influence unit leadership's willingness to collaborate. *Becoming a trusted partner will require just as much time listening and learning as talking and informing.* Below is a list of key considerations about how to approach establishing a collaborative relationship with unit leaders and your role in the partnership.

Key Things to Keep in Mind about Partnerships with Units

- Be a good listener
- Encourage unit leaders to talk to you about what they are facing – Remember knowing your partner and understanding their environment is an ongoing process
- Respect your partner – Remember unit leaders are the experts on their units and their people
- Remember that partnership development requires time
- Anticipate that the partnerships will change over time
- Create a two-way communication
- Adapt your approach to the culture and leadership patterns in each unit
- Set and exceed expectations
- Work with individuals who have the power to make things happen
- Share information and knowledge about work/life and community readiness issues and available services
- Stay connected with your units and keep aware of unit issues
- Acknowledge leadership support

Developing a connection and staying connected with your unit are critical. Getting to know unit leaders and members, learning the unit's culture and being seen in different environments will help facilitate your efforts with leadership. You will have to consider appropriate ways to do this for different units based on their comfort level and your access to unit leadership. Here are some ways to develop connections with your units:

- Review the bios of unit leadership so that you know the leader you are meeting
- Know some of the unique terminology for that squadron
- Don't wait to be invited
- Interact with unit leaders and members at base and unit events
- Get invited to and attend unit functions
- Be present at important unit meetings
- Sit in on or give a presentation at leadership functions (e.g., Commander's call, First Sergeant meetings)
- Observe and/or participate in training

- Meet with unit groups (e.g., spouse groups, family support groups) or periodically attend unit group functions.

TIPS ON HOW TO OVERCOME COMMAND RESISTANCE

Developing a long-term relationship with each unit will involve ongoing effort. Along the way, you may encounter various forms of resistance. Ways to address command resistance are:

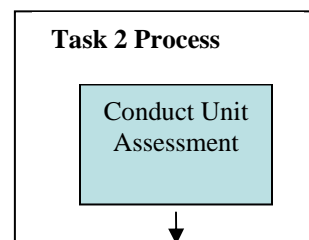
- Use common sense – it is important to develop a relationship with the unit chain of command before starting the assessment process
- Be flexible – remember the unit (and installation) has to respond to changing demands
- Be patient and persevere – remember unit leaders have a lot to handle; it may take time for units to trust you and understand your role
- Change your approach – take a more informal approach at the beginning if that helps to break down walls
- Reassure – make it clear to unit leadership that you are there to save them time rather than request more time from them, and let them know you will not be requesting office space or intruding on their space
- Keep offering information – remember unit leaders are looking for assistance in dealing with service member and family issues; consequently, offering useful information and a collaborative process to handle unit concerns indicates a willingness to help and shows that this is more than marketing the FSC
- Try to solve a small issue first to achieve success for the unit and win the trust of unit leadership
- Continue working on getting to know your unit – the more you know about the unit, the more you will be trusted and the better you will be able to advise and help unit leadership

TASK 2: ASSESS UNIT CONCERNS, STRENGTHS AND RESOURCES

Assessing concerns, strengths and resources is the first step in the process of assisting units in addressing work/life issues and enhancing community readiness. The purpose of the assessment is to:

- Develop unit profile
- Identify issues of concern
- Identify unit strengths and resources
- Determine potential solutions.

A good understanding of the unit and its people and mission can provide important background information for assessment activities. Therefore you are encouraged to **develop a unit profile** before talking with leadership and conducting other assessment activities. **Interviewing unit leaders** about their perceptions of unit strengths and concerns is another critical starting point. Avoid sharing your own concerns in this interview; take time to listen carefully and ask for clarification about issues that you do not completely understand. After talking with unit leadership, you may want to **collect information** about unit strengths and concerns **from other sources** as well.



The procedures for conducting these three assessment activities include:

Develop unit profile. Before you conduct interviews, collect data that can give you insights into how well unit members and family members are managing the competing demands of the military and family life. Data pertaining to three areas are particularly important to have at your fingertips:

- 1) demographics
- 2) incidence of problems (e.g., child and spouse abuse, DUIs, loans/letters of indebtedness)
- 3) readiness (e.g., attrition, retention) and OPSTEMPO (e.g., deployments, work hours).

These data can be collected from your FSC historical data and a variety of sources including: the unit, Military Personnel Flight, Health and Wellness Center (HAWC), Family Advocacy, and Security Police. These data will likely give you an early indication of some unit concerns. The data will also indicate some positive trends and strengths in the functioning of unit personnel and families, and you will want to explore these trends and strengths with unit leadership. Given the choice, you are encouraged to think about “the glass being half full rather than half

empty”. Unit leadership will appreciate a balanced perspective about the positives and negatives that emerge from your assessment.

Interview unit leadership. Unit leadership with whom you will be working throughout the “unit service” process should be given first priority in the interview process. (In all probability, these individuals will be the squadron commander and first sergeant.) Other members in the unit chain of command may need to be interviewed afterwards. The same interview protocol can be used across the chain of command. Below is a list of potential topics to be covered in leadership interviews.

Topics for Leadership Interviews

- Successes that unit leadership have had in supporting and building connections among unit personnel and families (i.e., unit resources for personnel and families)
- Unit personnel and family issues of concern to unit leadership (note: issues do not have to focus on negatives, they could also be areas where the unit wants to enhance their success)
- Ways in which these issues have been addressed by unit leadership and agencies
- Perceptions about how effective these efforts have been and the factors leading to effective and ineffective efforts (this includes identifying the unit’s strengths)
- Issues leadership would most like to address (i.e., priorities)
- Ideas about what services or actions are needed to better address issues
- Results leadership would like to achieve for unit members and families

Conduct other assessments. You can get an in-depth understanding of issues by collecting information from multiple sources. Information from diverse sources may reveal whether concerns differ across groups. (For example, does senior leadership have the same concerns as front line supervisors? Do leadership concerns differ from those of service members and family members? Do service members and family members have different concerns?) Such information will be important when determining priorities in the unit service planning process (see Task 3).

To keep leadership involved in the process, you should discuss or at least inform leadership that you would like to obtain additional information and the methods you intend to use. Other priorities and strategies for collecting information about the unit may include:

- Interviews with other personnel who interface with the unit (e.g., staff from other agencies)
- Written questionnaire completed by service members, family members or civilian personnel in the unit
- Informal conversations with unit leadership who were not interviewed as well as service members, family members, or civilian personnel in the unit
- Focus groups with service members, family members, and civilian personnel in the unit
- Discussions with unit family support groups
- Observations during unit activities
- Review of most recent Air Force Community Assessment Survey results for your installation.

You do not have to do all of these activities. You need to conduct the assessment activities that will provide you with the most complete picture of the unit and current concerns and strengths. The same topics discussed with unit leadership should be examined with other groups to get comparable information. However, you may find it helpful to add topics or follow-up questions to get additional information on specific issues that emerged from leadership interviews. You have probably collected sufficient information when common themes begin to emerge from these interviews.

Summarize assessment findings. You will need to prepare a summary of the information collected and present this summary to leadership. This summary will be needed for the unit service planning process (see Task 3). In preparing this summary, anonymity of interviewees needs to be maintained; combining comments across respondent groups can do this. Specific details that might explain comments should be added as needed and without indicating the name of the source. The summary should address the following topics:

TIPS ON INTERVIEWING AND CONDUCTING FOCUS GROUPS

- State purpose of the interview/focus group
- Ask a limited number of broad questions that can be answered in many different ways (avoid yes/no or short answer questions)
- Ask follow-up questions as necessary for you to understand each person's point
- Rephrase questions if they are misunderstood
- Encourage participants to provide details, including illustrative examples/stories
- Support and encourage interviewees who are reluctant to talk

Topics for Assessment Summary

- Purpose of the assessment
- Data collection methods
- Unit strengths and assets that support readiness and retention
- Service member and family issues of concern to this unit
 - Leadership's perspective
 - Unit personnel and families' perspective
 - Agencies' perspective (if obtained)
- Current strategies used to address issues and their effectiveness
- Ideas and recommendations for further discussion

This summary provides the foundation for working in partnership with unit leadership to:

- Prioritize critical issues
- Determine desired results
- Identify potential partners and their potential roles
- Specify actions needed from unit leadership
- Specify the services and actions that will be implemented and coordinated by the Unit Liaison.

This discussion and process are detailed in Task 3.

TASK 3: CO-DEVELOP A UNIT SERVICE PLAN

Armed with information from the unit assessment, leadership is in a better position to target efforts more directly to address unit issues and concerns. Because a number of concerns are likely to have been identified, determining a starting point and establishing a general roadmap are important. This is the purpose of the planning process that is to be conducted with each of your units. To develop a plan, issues will need to be prioritized and strategies identified for the issues of top priority. Your responsibility is to work together with leadership to develop a unit service plan that focuses on those issues in which the FSC will play a role. The level of contribution and involvement by the FSC will vary across issues. As the Unit Liaison, you can offer a range of assistance on behalf of the FSC:

What is a Unit Service Plan?

A unit service plan specifies the course of action that will be taken to address key work/life issues in the unit. This plan is developed through conversations between unit leadership and the Unit Liaison and specifies the services and activities to be provided by the FSC (including the Unit Liaison's assistance) and others. A sample plan is provided in the Appendix.

- Coordinate the delivery of existing FSC services in the unit
- Develop and implement new FSC services
- Facilitate collaboration between the FSC and other professionals, agencies or support organizations to provide a needed service/activity
- Help leadership implement a leadership program/activity
- Develop and/or disseminate FSC publications/materials.

Six key steps are involved in developing a unit service plan with leadership:

- Step 1: Identify key issues of unit concern and determine the priority in which issues are to be addressed
- Step 2: Establish desired results for unit personnel and families
- Step 3: Identify who needs to be involved to successfully achieve the desired results

TIPS ABOUT YOUR ROLE IN THE SERVICE PLANNING PROCESS

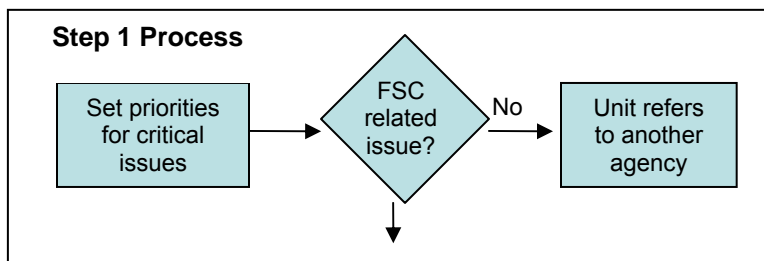
- Provide relevant or important information to leadership
- Encourage creative thinking and support new ideas
- Offer new ideas

- Step 4: Specify services to be delivered and actions to achieve the desired results
- Step 5: Specify the roles and responsibilities of the Unit Liaison and Commander in implementing the plan
- Step 6: Form a written plan and schedule.

A graphic picture of these steps is found on page 7 of this Guide.

Step 1: Identify key issues of unit concern and determine the priority in which issues are to be addressed. The planning process begins with a presentation and review of the unit assessment findings. The purpose of the presentation is to identify the “priority” issues of concern and provide a detailed picture of the nature (and causes, if known) of the problem or issue. Having conducted the unit assessment, you are to provide a presentation on key issues as you see them. (See Task 2 for a discussion on how to organize information in an assessment summary.)

As you give the briefing, you must listen carefully to reactions of unit leaders and their interpretation of the issues in the unit. After your presentation and subsequent discussion with unit leadership, an agreement on the top issues of concern needs to be reached. You can facilitate this discussion by inviting leadership to review your proposed list of top priorities. In addition, you may want to discuss with leadership the key considerations in making a decision about priorities. These considerations might include:



- 1) what results are desired or demanded by base leadership and/or Air Force leadership,
- 2) what issues take up the most leadership time,
- 3) what issues can most easily be addressed, and
- 4) what issues when resolved would provide the most immediate or greatest impact on short and long-term goals.

One way to set priorities is to ask leadership to rank the issues in priority from 1 (top priority) to 5 (lower priority for now). Reaching some agreement with unit leadership on **only one or two** priority issues to address will focus your attention, and that of leadership, on a limited number of target concerns. This will allow resources to be maximized. In many cases, the issues identified will be highly interrelated. Consequently, working on any one issue will have implications for the others.

In this discussion with leadership, you will need to determine the key issues in which the FSC can play a role in resolving. This is an important part of the discussion, since the unit service plan will be developed around only those issues in which the FSC will play a significant role. If a high priority issue is uncovered that demands attention but is not within the scope of the FSC, the unit commander should be advised to bring in the appropriate agency to address the issue. You may be asked to help identify an agency or another professional to take on that issue but the Commander should be the point of contact for that discussion.

The decisions made during these discussions can be recorded in your personal notes in a table format, such as the one below.

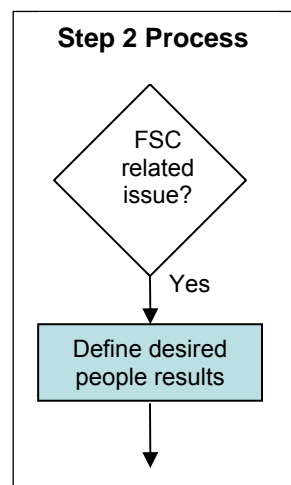
Step 1 Strategy and Example			
Unit Work/Life Critical Issue	Order of unit priority (1-5)	Issue that FSC can assist unit? (yes/no)	If no, agency for referral
# of unit personnel with financial problems	1	Yes	
Spouses need child care for family support meetings	3	No	CDC-Services

Step 2: Establish desired results for unit personnel and families.

Once the top priority issues that the FSC will help unit leadership address have been determined, then the desired results for personnel and families should be clearly defined for these issues. This is an important step as activities, services, and actions will be determined based on the results desired. The discussion with leadership in this step of the planning process should focus on the question: *“Given the priority issues in the unit, what specific results do leaders want to achieve for unit personnel and families?”*

Talking about the results leadership want to achieve will be appealing to leadership. During this discussion, you can assist leadership by helping them reframe concerns into achievable results. In many instances, it is possible to reframe a concern into its positive counterpart. For example, a unit may have concerns about the difficulties civilian spouses experience during deployments. The unit may select the desired result to be a stronger support system for spouses rather than to specify the desired result as fewer spouses having difficulties coping during deployment. Specifying this result will have implications for where and how efforts will be directed and subsequently how the unit addresses this issue. This example illustrates how desired results should be defined with thought given to what is most important to achieve to address the issue of concern.

A good “desired result” is positive in tone, actionable, and can be assessed by measures that you can easily develop or acquire. When the result is achieved, the underlying problem or issue



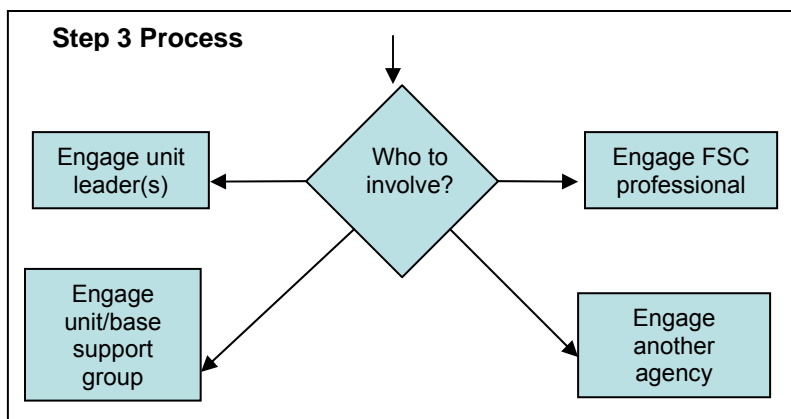
should be less evident in the unit. A desired result is your target – what you want to achieve for the specific group of people for whom the issue has been raised. For example, the target group might be spouses or junior enlisted personnel or singles in the dorms. The result might be that they are adapting well to a deployment or that they are paying their bills or making satisfactory relocation adjustments.

The decisions made during these discussions can be recorded on the FSC Unit Service Plan Worksheet. This is a planning tool that is provided in the Appendix of this Guide. An illustrative example for Step 2 is provided below. This illustrates a reframing of a commonly reported issue to focus on three desired positive results.

FSC Unit Service Plan Worksheet – Step 2 Example				
1. Issue: (priority issue from unit assessment: 1 per worksheet page)	2. Desired Results: (measurable results that unit personnel/families will achieve)	3. Who to Involve: (list: FSC, unit CC member, agency, and/or support group)	4. Required Actions: (specific services/actions expected from FSC, unit leaders, agencies, or groups in #3)	5. UL/Cdr. Activities: (specific actions that the FSC & Unit Commander will perform to initiate the required actions)
Junior enlisted personnel are having significant financial problems, including letters of indebtedness and not being able to make credit card payments	Fewer letters of indebtedness having to be prepared			
	Less time off work due to financial problems			
	Higher percent having a budget to manage their money			

Step 3: Identify who needs to be involved to successfully achieve the desired results.

Having specified the desired end results that leaders want to achieve, you should focus the discussion with unit leadership on the key question: *“Who do we need to involve if we are to achieve these results?”* This question is designed to identify the key players both within and outside the unit that will have a role to play in achieving the results and therefore should become involved in the planning process. In the graphic Flow Model for the Unit Service Strategy, you are



directed to consider four potential sets of partners: unit chain of command members, FSC personnel, other on- and off-base agencies, and unit or base support groups.

In determining who will be involved, it is important to first determine the persons within the unit chain of command. Because the overall intent of the plan is to aid unit leadership in addressing individual and family issues, the role for all levels within the unit chain of command will need to be specified as appropriate. Leadership attention and support for the desired results are essential. Consequently, the planning process should be conducted with the appropriate people in the chain of command (in most likelihood the squadron commander or first sergeant) who can make decisions and assign tasks. Although it may not be advisable to have all members of unit leadership present, the squadron commander may elect to have a group of key unit leaders present in the planning process.

Because a second intent of the plan is to enable the FSC to serve units better, the responsibilities of appropriate FSC staff will need to be specified. This can include a particular FSC professional or a service area of the FSC.

You and unit leadership may determine that other potential partners need to be involved in the plan. These partners could include specific agencies that also target the issues and results under consideration (such as chaplains, legal, or Family Advocacy), or who have resources that may be vital in achieving the results (such as United Way, Services Squadron or AAFES). You may also want to consider whether the involvement of a spouse support group or dorm council or other volunteer group can help to build a successful plan.

It may be helpful before going into a planning meeting with unit leadership to meet with your FSC colleagues or other base agencies to discuss potential partners and their involvement in working the plan. Keep in mind that it may be best to have unit leaders invite other agencies or support groups to participate in this process to make clear the importance of this plan to the readiness and effectiveness of the unit and its people.

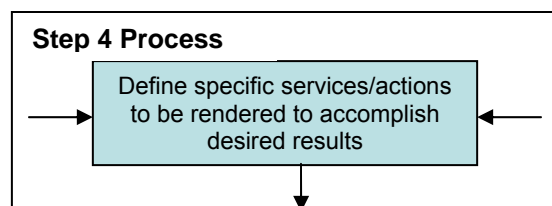
The decisions made during these discussions can be recorded on the [FSC Unit Service Plan Worksheet](#). An illustrative example for Step 3 is provided at the top of the following page. The order of “Who to Involve” does not have to match up with the “Desired Results” since the partners can contribute to more than one result.

FSC Unit Service Plan Worksheet – Step 3 Example				
1. Issue: (priority issue from unit assessment: 1 per worksheet page)	2. Desired Results: (measurable results that unit personnel/families will achieve)	3. Who to Involve: (list: FSC, unit CC member, agency, and/or support group)	4. Required Actions: (specific services/actions expected from FSC, unit leaders, agencies, or groups in #3)	5. UL/Cdr. Activities: (specific actions that the FSC & Unit Commander will perform to initiate the required actions)
Junior enlisted personnel are having significant financial problems, including letters of indebtedness and not being able to make credit card payments	Fewer letters of indebtedness having to be prepared	FSC financial assistance		
	Less time off work due to financial problems	Unit First Sergeant and Unit Supervisors		
	Higher percent having budget to manage their money	Legal Affairs		

Step 4: Specify services to be delivered and actions to achieve desired results. Once you and unit leadership have determined who needs to be involved, these individuals (or representatives) should be invited to a planning meeting so that a full discussion can be held about how best to achieve the desired results. The discussion of the planning group should focus on the key question: *“What services or actions can people, agencies or groups implement that will help achieve the desired results?”* In defining the services or actions expected by those participating in the plan, it is important to ensure that each activity by each player has the intended purpose of achieving the Step 2 Desired Result for the people who are targeted.

This tie to the desired results is key: current classes or activities may or may not be explicitly designed to achieve the specific results that are expected from your plan. You may not always be able to use “off the shelf” activities or strategies that are easy to implement. For example, it is not enough to say that a class will be offered or counseling provided, a planned activity should state, for example, that “Individual counseling will be offered to all E1-4 suspected of debt problems or willing to seek help for debt problems.” That will make clear to the agency involved who they are to serve and what result they are to expected to help achieve.

For each desired result to be achieved a detailed plan for action will need to be prepared and confirmed by those who will be accountable for ensuring that appropriate actions are taken. It is critical to remember to “plan with” rather than “for” partners – involve partners in the planning stage as early as possible.



You are also encouraged to think about the script for partners in the following format: “The partner will do what for whom for what purpose.” As an example, the Family Support Center (i.e., who) will offer financial management classes (i.e., what) for junior enlisted members (i.e., for whom) to instruct them in how to develop and maintain a budget (i.e., for what purpose).

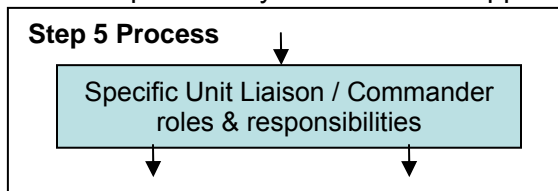
To facilitate this discussion, you should offer to the extent possible the following information: 1) what is already being provided to the unit and whether or not these efforts are working from the perspective of unit leadership (information which you may have shared in your assessment findings briefing to unit leadership), 2) what strategies are recommended based on research evidence or practice experience, and 3) what is needed to improve results (information you may have gleaned during the unit assessment phase). Other individuals present in the planning may be able to add to this information.

The decisions made during these discussions can be summarized on the FSC Unit Service Plan Worksheet. An illustrative example for Step 4 is provided below. Specific accomplishments should be listed for each person or agent referenced in Step 3.

FSC Unit Service Plan Worksheet – Step 4 Example				
1. Issue: (priority issue from unit assessment: 1 per worksheet page)	2. Desired Results: (measurable results that unit personnel/families will achieve)	3. Who to Involve: (list: FSC, unit CC member, agency, and/or support group)	4. Required Actions: (specific services/actions expected from FSC, unit leaders, agencies, or groups in #3)	5. UL/Cdr. Activities: (specific actions that the FSC & Unit Commander will perform to initiate the required actions)
Junior enlisted personnel are having significant financial problems, including letters of indebtedness and not being able to make credit card payments	Fewer letters of indebtedness having to be prepared	FSC financial assistance	Individual counseling offered to all E1-4 suspected of debt problems or willing to seek help FSC budget and money management classes offered to dorm residents and married members/spouses	
	Less time off work due to financial problems	Unit First Sergeant and Unit Supervisors	Understand how to refer persons for help before difficulties are serious Track E1-E4's to ensure that they participate in FSC budget and money management classes	
	Higher percent having a budget to manage their money	Legal Affairs	Provide training on law and debt issues to first sergeants, supervisors and E1-4 personnel	

Step 5: Specify the roles and responsibilities of the Unit Liaison and Commander in implementing the plan.

Having specified the accomplishments and role of key players needed to address unit concerns, you will need to determine what preliminary actions and supports need to be taken by you and unit leadership to implement particular services and to support implementation of the unit service plan. The key question for this discussion with leadership is: *“What actions do we need to take to implement the specified services/activities?”* Key matters to consider are: 1) who in the unit needs to take on responsibilities and how is this to be initiated, 2) how can you as the Unit Liaison facilitate the services and activities to be provided by FSC professionals, 3) who is to contact and ensure participation by other agency staffs or support organizations, and 4) what information or training is needed to address attitudes and/or to enhance knowledge and skills required to perform activities.



The decisions made during these discussions can be recorded on the FSC Unit Service Plan Worksheet. An illustrative example for Step 5 is provided below. Specific activities should be

FSC Unit Service Plan Worksheet – Step 5 Example				
1. Issue: (priority issue from unit assessment: 1 per worksheet page)	2. Desired Results: (measurable results that unit personnel/families will achieve)	3. Who to Involve: (list: FSC, unit CC member, agency, and/or support group)	4. Required Actions: (specific services/actions expected from FSC, unit leaders, agencies, or groups in #3)	5. UL/Cdr. Activities: (specific actions that the FSC & Unit Commander will perform to initiate the required actions)
Junior enlisted personnel are having significant financial problems, including letters of indebtedness and not being able to make credit card payments	Fewer letters of indebtedness having to be prepared	FSC financial assistance	Individual counseling offered to all E1-4 suspected of debt problems or willing to seek help. FSC budget and money management classes offered to dorm residents and married members/spouses.	UL to contact FSC and arrange debt counseling and budget and money management classes in the unit or referrals if appropriate. Cdr. to set aside training time for budget and money mgt. classes
	Less time off work due to financial problems	Unit First Sergeant and Unit Supervisors	Understand how to refer persons for help before difficulties are serious Track E1-E4's to ensure that they participate in FSC budget and money management classes	Cdr. to arrange chain of command meeting on financial issues Cdr. to ensure supervisors attend UL to provide checklist of financial problem warning signs for first sergeant and supervisors use
	Higher percent having a budget to manage their money	Legal Affairs	Provide training on law and debt issues to first sergeants, supervisors and E1-4 personnel	Cdr. to request training from legal affairs

listed for both the Unit Liaison (UL) and the Unit Commander (Cdr). In this example, the Unit Liaison and Commander have specific responsibilities to initiate services and to engage other agencies and people in the unit to participate in the plan.

Step 6: Form a written plan and schedule. Having completed the planning process and the FSC Unit Service Plan Worksheet, you and your unit leadership have a written document representing the course of action that you both feel is needed to address a key unit member or family issue. Having made these decisions, you and your commander should determine an implementation timeline (i.e., schedule). This timeline should also indicate when your own support actions (step 5) will occur.

At this point, meetings within the FSC or within the unit may need to occur so that individuals not directly involved in the planning process are informed of the plan and asked for input. These meetings may be necessary to obtain the necessary buy-in and support as well as to implement the plan. You will also need to hold a planning meeting with other partners involved in the plan to ensure that the plan and timetable meet their organizational schedules as well.

It is important that you and unit leadership periodically review the unit service plan and determine the status of goals and activities. New unit service plans should be developed when goals are changed, desired activities cannot be implemented, or activities do not produce desired results.

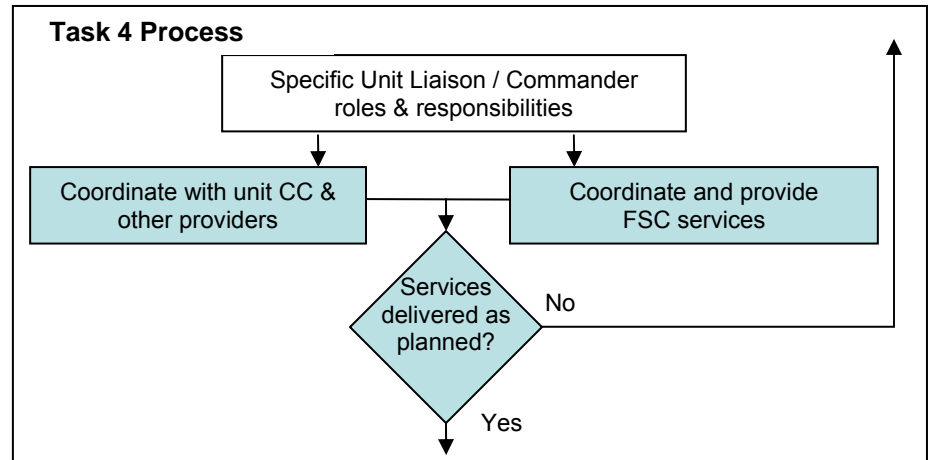
TASK 4: IMPLEMENT AND MONITOR UNIT SERVICE PLANS

You and your unit leaders have facilitated discussions and planning in which the activities that need to take place to address unit issues of concern have been determined and the tasks involved and timeline have been outlined. Now, it is time to implement the unit service plan and monitor activities. This is an important task in which you and your unit leaders will need to:

- Provide any necessary preparations or activities to facilitate implementation
- Ensure the unit service plan is implemented
- Ensure accountability for all persons involved
- Identify and address problems that arise
- Work together to make any necessary adjustments to the unit service plan
- Provide feedback to unit leadership, FSC, and other service providers.

There are three key steps you will need to perform:

- Step 1. Coordinate implementation of FSC activities and responsibilities
- Step 2. Assist in coordination of unit and other organization personnel
- Step 3. Monitor plan activities with unit leadership.



Step 1. Coordinate the implementation of FSC activities and responsibilities defined in the unit service plan. During the service planning process, FSC activities and responsibilities were defined in step 4 of Task 3. (For your FSC, refer to the completed FSC Unit Service Plan Worksheet). Your responsibility is to ensure that all of the FSC areas of responsibility are performed. This means that you will have to do a variety of things to include:

- Coordinate the delivery of existing FSC services in the unit. You will provide services to your units as well as schedule requested services in collaboration with appropriate FSC staff. A number of questions are involved in establishing this process:
 - How will you inform the FSC of your unit's needs? (e.g., on a form, in a meeting, through your Flight Chief, talking directly to a particular FSC staff member)
 - Who from the FSC will contact your unit to schedule FSC services? (you or the FSC staff member providing the actual service)
 - What customizing of any existing FSC service, if any, is needed to address specific issues in the unit you are serving and how will this customization be done? To what extent should you be involved in the customization?
 - How should each unit requesting a particular activity be served? Would this occur on an individual basis or should a particular service be provided to multiple units simultaneously?
- Develop and implement new FSC service(s). This will require that your FSC have a process by which you can inform appropriate FSC staff of the services that need to be developed to meet your unit's needs as well as the scheduling of these services. In addition to the issues stated above under coordination, other implementation issues will need to be considered:

- How will Unit Liaisons share information among themselves regarding the needs of the units they are serving and thus be able to identify common issues of concern?
- Under what circumstances are new services developed? (i.e., Will a service be developed to meet a single unit's needs or will the service be developed only if multiple units need the service?)
- Who will develop these services and to what extent should the Unit Liaison be responsible and/or involved (based on the unit assessment, conversations and planning that have been conducted)?

Step 2. Assist in the coordination of unit personnel and other organizations responsibilities defined in the unit service plan. Unit personnel and, possibly, other agencies will have action items built into the unit service plan. Your responsibility is to assist unit commanders in making appropriate contacts with individuals, groups and organizations to ensure that their responsibilities are performed. This means that you will have to do a variety of things to include:

- Provide unit leadership with referrals to an on- or off-base agency. If in your discussions with unit leaders, it was determined that other agencies will work independently to provide a service to the unit at large, then you will need to provide contact information for the unit leadership. It will NOT be your responsibility to make the necessary arrangements for the agency's services. Your role is to facilitate the connection between the agency and your unit leadership and thus you should provide the essential information that will enable your unit leaders to contact and talk with the identified agency. If your unit leader requests that you be a part of the discussions and meetings with the agency, then you will need to decide if it is appropriate to assume that responsibility. Remember, you could be perceived as acting under the authority of the commander to obligate services from other agencies and that might be considered inappropriate.
- Develop and/or arrange training/guidance for leadership that will help implement a leadership service/activity. In the course of planning discussions with your unit leaders, it may be revealed that designated unit leaders need specific information and/or training to carry out a specific activity or to feel comfortable performing a particular activity. Where the information and/or training have been specifically identified, you will need to develop and arrange for this training. If the information or training is to come from outside the FSC (e.g., Family Advocacy, Life Skills), then you can facilitate getting these services, if you feel you are in a position to do this easily. Otherwise, you should provide contact information so the unit leadership can make the necessary arrangements.
- Develop and/or disseminate publications/materials available from the FSC. You will need to get and deliver the necessary materials or arrange for the delivery of materials to your unit. If new materials need to be developed, the FSC will need to determine who will write and produce the material.

Step 3. Monitor plan activities with unit leadership. The purpose of monitoring is to ensure activities are occurring as planned and also to identify and address any areas where implementation efforts need further facilitation. You will need to develop a strategy with unit leadership and other key partners for monitoring the implementation of the unit service plan. Your FSC Unit Service Plan Worksheet can be a useful tool for guiding this process—the plan identifies the activities of all partners, as well as the activities of the Unit Liaison and the unit commander. As part of this discussion, you should ask your unit leaders about the best ways to keep them informed of the status of the unit service plan (i.e., e-mails or phone calls) and when meetings should be held to review progress made.

Monitor FSC activities and tasks. The purpose is to ensure FSC activities are being provided and according to the schedule in the unit service plan. This monitoring includes ensuring that you have performed all the tasks that you personally agreed to in your discussions with your unit leaders, as well as monitoring FSC activities. Monitoring will require you to:

- Confirm that FSC services have been scheduled and verify that they were provided to your unit
- Keep the Flight Chief informed on any special issues or agreements that have been made
- Conduct any follow-up on customer referrals
- Verify with unit leadership that expected services are being provided
- Work with unit leadership to address any issues about FSC services (e.g., complaints about delivery of service, feedback on the information conveyed in a service, need to arrange additional sessions/repetition of a service).

Monitor unit leadership activities. In this area, you are ONLY responsible for following up on those unit leadership activities in which you (or the FSC) have provided some level of support (e.g., training, information, or joint product development). In addition, you can also monitor whether unit leaders provided the level of support to the FSC that they agreed to in the plan. In this manner, you will monitor to:

- Provide feedback regarding unit support for FSC activities (e.g., any difficulty scheduling services)
- Provide any follow-up where training, information or guidance was provided to unit leadership from the FSC
- Help to address any problems encountered, as appropriate.

Aside from these areas, it is advisable to allow unit leadership to monitor unit activities. However, it is important to invite unit leadership to share information about their progress so that you and your unit leaders can get a total picture of how well the plan is working and whether some changes need to be made or additional actions are needed.

Monitor other agency or support group activities. The activities of other base or off-base organizations or support groups can be monitored through periodic meetings or brief phone calls with the people responsible in these organizations/support groups. These contacts are intended to assess progress in implementation and to update your planning document on whether the schedule in the plan is being kept. You and your unit commander should discuss who is in the best position to monitor the activities of partners. Again, it is important not to overstep your boundaries—your goal is to build a joint partnership with other agencies and support groups.

TASK 5: EVALUATE RESULTS FOR THE UNIT AND ITS PEOPLE

Evaluation involves an honest reflection on whether the results for unit personnel and families that were specified in the unit service plan really occurred and whether the partners in the plan effectively did their part in supporting and implementing the plan. You may be tempted to avoid this task but several key lessons are learned when you conduct an assessment to determine the consequences of the plan you helped to design:

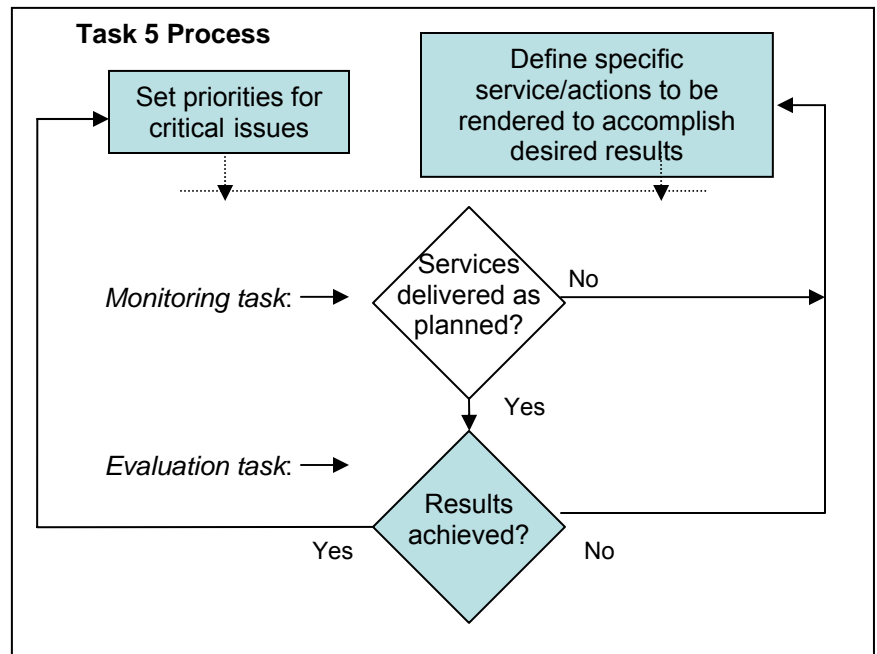
- New knowledge and wisdom about prevention/intervention practice is created
- You and your unit leaders experience a sense of accomplishment for a job well done
- You reinforce the value of collaboration for yourself and your partners
- You create “lessons-learned” that can be passed on to other units you serve and other Unit Liaisons who may confront similar issues.

You obviously will want to share information about successes. However, you will also want to share information with other Unit Liaisons about plans that did not work out and about plans that were implemented successfully but did not produce the results intended for unit members and families. Lessons are learned not only from “what worked,” but also from “what didn’t work.” The key point is to have some basis for making such a determination. Although results are not always black or white, an evaluation gives you an opportunity to gauge the extent to which results in the service plan were achieved.

Evaluation is different than monitoring, which was discussed under Task 4. Monitoring involves assessing whether the service plan design was actually implemented as planned. Were specified activities performed, and to what extent? Monitoring assesses if the “best laid plans” were really carried out. If the plans were not executed or executed poorly, it is unlikely that the desired results will be achieved.

Evaluation involves the other side of action—what were the consequences of these activities for the people who were served or helped through this new strategy.

Were their lives improved in some tangible way because the unit service plan was implemented? What evidence do you have that what everyone hoped would occur actually did occur? If results were positive, do you have the data to show your commander that this process made a difference? And can you now say that the issue initially uncovered in the unit assessment has been addressed and that you and unit leadership are ready to tackle another issue? Or, if the results were not what were hoped, can you and unit leadership go back and redefine the strategy to increase the probability of success the next time?



Four steps are involved in evaluating the unit service plan:

- Define indicators for results
- Collect data
- Analyze data
- Communicate results.

Each of these steps is discussed below.

Step 1: Define indicators for results. Evaluation requires identifying and selecting metrics or indicators to gauge success. In the process of developing the unit service plan, desired results for unit personnel and families were identified. In order to collect data, you will need to define metrics (i.e., a measure) for each result so that you can determine whether results were obtained. Indicators are typically expressed either as a number, percent or rate. In the process

of developing the unit service plan, accomplishments for the FSC, unit and other partners were also identified. In determining whether accomplishments were achieved, some measures will be dichotomous. For example, was there a reduction in the number of letters of reprimand for financial mismanagement (e.g., no, yes)? A rate might also be used (e.g., 50% of junior enlisted now have a budget for managing their expenses).

When developing the unit service plan, you will find it helpful to establish with unit leadership a performance standard for each intended result. This will aid the evaluation process. A performance standard is a rate or number that you feel is appropriate to set as a benchmark for determining success for your intervention strategy. In choosing an indicator, you need to specify “what constitutes success.” Otherwise, you will have no basis for drawing conclusions about success or failure. Setting performance standards is not always easy, and you should work closely with your Unit Commander and your partners in determining the desired outcome for the people you are targeting through your strategy. For example, if through a questionnaire administered during the unit assessment phase you found that only 45% of married junior enlisted personnel are able to pay their bills on time, what rate would you consider to represent success after your intervention? You want to set a rate that is realistic, such as 65%, with the opportunity to learn from this effort and then move to a higher rate through an enhanced strategy. Setting a rate at 90% may be unrealistic and set you up for failure.

Step 2: Collect data. After having defined indicators, you need to determine from where the data will be collected (i.e., data source for your result indicators). The data may be collected from:

- Administrative records (e.g., reports of judicial actions)
- Questionnaires (e.g., a short questionnaire sent to participants in the activity)
- Feedback from partners (e.g., FSC or other agency staff report on the number of people who have made timely bill payments in the past 3 months)
- Observations (e.g., ratings by chaplains on marital problems in the unit)
- Follow-up assessments (e.g., self-reports from unit members on successful relocations to their new base).

Many indicators have more than one data source and these combined sources of data may provide a more refined picture of whether the result was achieved.

It is important to remember that data collection efforts do not have to be hard or complicated to yield good information. You should use information that is readily available before designing new forms or questionnaires to collect data. Why reinvent the wheel? When you have to develop a data collection instrument, try to keep the data collection tool short and easy to

complete, whether this involves a follow-up questionnaire with unit personnel and families or an administrative form to document incidence reports by unit supervisors. Be sure to check with other Unit Liaisons before you develop new data collection tools—they might have already developed such a tool or know about an existing tool or administration form.

Several important strategies are recommended for getting reliable and valid data:

- Do not ask for names or identifying information, if at all possible. One exception to this is in follow-up questionnaires when you need to know if intended changes actually occurred. In that case, ask only basic information and offer the respondent anonymity (that you will not share personal information but only summary information across all those who participated).
- Keep your requests for information short. Only ask what is absolutely necessary. The more you ask and the more demanding the request, the less likely people will respond. Questionnaires or forms of one page or less are more likely to be answered.
- Avoid jargon and use language that is easy to read and interpret. Make it easy for everyone to understand.
- Pretest your form on people just like those who you are targeting. Get input from other professionals first but then ask a few people who will not get your form to give you honest feedback.

Step 3: Analyze data. After you have collected data, you must summarize the information to answer your evaluation questions. In other words, you must derive meaning from the data collected to determine what results have been achieved and to what extent. First, you must summarize any observation or interview data to determine the extent to which this information represents a positive or negative finding.

EXAMPLE

In interviews, unit chain of command members reported fewer requests by junior enlisted for time off from work due to financial problems in the last 60 days. From this finding, you draw a positive conclusion about the success of an initiative to improve the financial stability of junior enlisted families. Although such interview data may seem rather soft, a change in the perspective of members of the chain of command can be a very powerful finding, especially when the information comes from the squadron commander and first sergeant.

Second, you must calculate totals and percentages for any administrative data and questionnaire data. These data offer you a chance to quantify behavioral changes as well as subjective data, such as perceptions from members of the chain of command. When examining

data, it is helpful to look across different types of data or compare your data findings to other data (e.g., comparing unit data to installation data). This can be helpful in assessing whether some level of success has been achieved. However, it is most important to compare your results against the performance standards that were established as part of step 1. This comparison will indicate whether the unit's goal has been achieved.

EXAMPLE

A random sample of 50 junior enlisted members in the unit was asked to complete a questionnaire on how often they paid their bills on time. From an analysis of the questionnaire responses, you found that 62% paid all their bills on time last month. These results can then be compared to the overall results for the base on the 2003 Air Force Community Assessment. If unit results were further combined with administrative data from AAFES for the last quarter that showed a decrease in delinquent accounts more than 60 days past due and a decrease in dishonored checks at AAFES for unit members, you might begin to draw positive conclusions about the success of the particular unit service initiative.

It is easy to make the process of collecting and analyzing data harder than it needs to be. But remember, you are not the only one responsible for analyzing the data—you are working as a partner with your unit leadership. The Unit Commander, and other partners, should be engaged in this process as well. Last but not least, success does not always mean crossing the performance standard bar. You and your unit leaders may decide the bar was placed too high from the start and thus a revision of the unit service plan is necessary. However, small gains and accomplishments are to be rewarded and an indication that things are moving in the right direction. This is important to remember since some results are not easily achieved.

A summary of the findings (administrative data, observational data, questionnaire, and interview data) should be prepared. You will need to highlight the desired results that have or have not been achieved and the reasons for successes and pitfalls. Your unit leaders will appreciate your pulling together the results of the evaluation to make an assessment of how well the plan has been achieved.

Step 4: Communicate results. The importance of effectively communicating results is critical to your reputation and to the credibility of the unit service strategy. The most important thing to remember is to not “oversell” results. Be cautious in your interpretation and presentation of findings—you may be uncertain about some results and there is always more than one conclusion from a set of data. The intent is for everyone to learn from the results. Having a dialogue about the results with the unit commander, intervention partners, FSC staff members, including the FSC Flight Chief, and unit personnel and families who are the focus on your efforts, can be informative. This dialogue can be particularly helpful in designing and developing future unit service plans for your unit as well as other units being served.

Remember to always keep your FSC Flight Chief aware of issues and prevention/intervention actions so that she/he can provide senior wing leadership with an overall view of how the wing is doing.

The presentation of the findings can be made through briefings or in the form of short reports. The presentation should address the following topics:

Topics for Evaluation Summary

- Overview of the unit service plan, including a statement of the priority concern or issues
- Desired results for unit personnel and families
- Evaluation indicators for each desired result
- A list of partners involved in working the plan and their respective roles and objectives; an identification of your responsibilities and the responsibilities of the Unit Commander
- An assessment of accomplishments and results achieved in the context of performance standards
- Lessons learned and next steps

In giving this presentation, you may think of it as telling a story. A key objective of the story is to engage others in a discussion about ways to strengthen initiatives in support of improving the ability of unit personnel and families to manage the demands and responsibilities of Air Force life. Your story will provide both positive and negative feedback as well as document the effectiveness of efforts. This information will be used to determine how to promote the changes needed.

TASK 6: SUSTAIN A UNIT SUPPORT AND RESOURCE NETWORK

As a Unit Liaison, you serve as the face for your FSC – you broker and facilitate the delivery of FSC services to your unit. You also help unit leaders address unit issues more effectively. In a nutshell, you facilitate a process from which everyone learns.

You are not a solo act – you are working in partnership in several respects.

First, you help unit leaders identify and address critical issues among unit personnel and families by calling upon the full resources of the base community.

Second, you involve your FSC colleagues and others in this process to align support and service in such a way that unit personnel and families at your installation are better able to manage the competing demands of the military mission and family life.

Consequently, you cannot accomplish your mission without utilizing and sustaining a strong relationship with your support and resource network. At least five steps are involved in maximizing the support available from your resource network:

- Stay informed
- Coordinate with other Unit Liaisons
- Stay connected with FSC colleagues
- Establish partnerships with on- and off-base agencies
- Nurture the development of support networks in the unit and the community.

Stay informed. To work effectively with unit leadership, FSC colleagues, and agencies, you must stay abreast of individual, family and community issues. More importantly, you must keep up with the literature on what services and strategies are most effective in addressing particular individual and family issues. Although there are a number of publications and web-based resources about “best” and “promising” practices, other Unit Liaisons are one of your best resources. You can “be the change” by reaching out to other Unit Liaisons to have discussions about intervention strategies that are yielding positive results. Knowledge from other people who have been successful in dealing with issues like the ones you are facing is essential in planning and discussions with key players about service development. Remember the goal is to promote what works (e.g., proven and promising strategies). The aim is to support units through the delivery of services that best address unit personnel and family concerns. Although you can take steps to enhance your own knowledge, you can and will also learn from others.

Coordinate with other Unit Liaisons. In all probability, other staff at your FSC will also have Unit Liaison responsibilities. In the context of your common goals, you can support each other and facilitate mutual efforts in a number of valuable ways:

- Identify common and unique patterns in the strengths and concerns of unit personnel and families across the units you are serving. Both positive behaviors and problem behaviors are important to share as they can provide insight into similarities and differences among particular units. This information will promote the development and implementation of common strategies/activities in unit service plans, which may have positive implications for time and resource demands. This information should also be shared with FSC staff who may have ideas about how best to align FSC supports and

services to build upon the strengths of unit personnel and families and more effectively address their issues and concerns. (See staying connected with FSC colleagues below and in Task 4.)

- Coordinate communication and working relationships with other agencies to facilitate and coordinate delivery of services to units (i.e., when multiple Unit Liaisons need to work with another agency, how will this be done? If multiple issues are involved in the collaboration with a particular agency, how will this be done?) Other agencies will appreciate the coordination of these contacts.
- Assist in defining and measuring results (i.e., including developing indicators and sharing in the development of data collection tools). Although units may vary somewhat in the specific nature of issues and concerns, many of the desired results across units will be similar. Over time, you should be able to work with other Unit Liaisons to develop some common metrics for evaluating the effectiveness of planned interventions.
- Share evaluation results to promote the use of effective activities/strategies in units. There is nothing more positive and efficient than building on the success of others. Part of sharing your success means providing details about the intervention(s). Therefore, be sure to keep notes during monitoring on how your interventions were implemented – this will facilitate good recall when sharing positive results with your colleagues.

Your group will need to determine how to share information and the best ways to work together. Of course, many professionals prefer e-mail communication. In all likelihood, a mixture of group meetings and informal communications, such as e-mails, will be needed, but the group needs to reach some consensus about how best to maintain contact. In addition, your group will need to develop protocols and procedures for working with other FSC staff and other agencies.

Stay connected with FSC colleagues. Although as a Unit Liaison, you are performing a vital function for the FSC, you will need to involve other FSC staff in serving units effectively. This is particularly the case since other FSC staff will be providing FSC services to your unit and handling referrals from your unit. In addition, you may work with other FSC staff to revise existing services, develop new activities, and prepare new publications/materials. Thus, your FSC will need strategies and procedures that enable staff to work together to ensure continuity of quality service and seamless delivery of service to units. There are a number of ways in which you can facilitate your FSC colleagues' efforts:

- Share information on the priority issues you are addressing, as well as the desired personnel and family results. This can help other FSC staff to determine the services they should provide, especially specialized services in related service areas (see Task 4)
- Inform FSC staff on the effectiveness of services based on results obtained in units

- Provide input for FSC staff meeting agendas
- Be sure to offer assistance to FSC staff in the delivery of any services offered to your unit
- Keep FSC staff informed of any issues/problems that may impact service delivery in the units (e.g., deployments, cancellations, changes of location)
- Inform FSC staff about any staff or service changes at the agencies that you work with so that FSC can maintain up-to-date information for referral purposes
- Update and keep the Team Leader and/or FSC Flight Chief informed about the successes in your working relationships with FSC staff, as well as ways to strengthen this interface.

The success of the unit service initiative depends upon the full cooperation of the FSC staff. Consequently, there are a number of ways that FSC staff can assist you in making this initiative a success:

- Keep abreast of FSC services and activities, procedures and forms so that you can provide relevant information to units as needed
- Identify information about FSC service changes that need to be shared whenever you are representing the FSC in interagency meetings
- Keep you informed about any staff or service changes at agencies so that you are aware of such transitions when contacting agencies or providing referral information to units
- Inform you when FSC services are delivered to your unit
- Keep you up-to-date on the status of any unit referrals made to the FSC
- Provide or facilitate any follow-up needed based on your feedback from the units
- Provide consultation on the development of unit service plans (especially information on “What works”).

Establish partnerships with on- and off-base agencies. Other agencies are valuable players in the unit service initiative. These agencies offer a variety of services that enhance the quality of life of unit personnel and families. Agencies will likely see your direct delivery of unit service to have positive implications for the entire human service delivery system. Further, based on your unit assessment, you can provide agencies with key information about the priority issues that need to be addressed. They in turn can provide expertise to you and your units, especially when they are invited to participate in the planning process. In addition, some of these

agencies may have their own unit outreach initiatives. Consequently, coordination with other service providers will be important to prevent the overlap and duplication of efforts as well as to facilitate delivery of agency services to units.

Many reasons exist to maintain relationships with other agencies on and off the base:

- Have an established contact(s) with agencies so that you can provide referral information to units and have a point of contact when collaborative efforts are needed
- Remain abreast of agencies' services
- Share information about issues of concern and results based on your and agency evaluations
- Work with agencies to identify unit concerns and to develop and implement unit service plans, where appropriate
- Manage and facilitate FSC referrals to agency
- Confer with agency staff and discuss strategies for addressing unit issues (i.e., to learn about "What Works" and to collaborate on initiatives).

Other agencies may also assist you in developing interagency strategies when common concerns are identified. Your FSC Flight Chief will need to provide guidance on your responsibility in this area. In other words, your FSC will need to determine when individual members such as Unit Liaisons can work one-on-one with agencies and when and who should be the FSC representative at working groups/committees (such as Community Action Information Board (CAIB) and People Helping People-Integrated Delivery System (PHP-IDS committees) involving multiple agencies.

Nurture the development of support networks in the unit and the community. Many resources exist in an Air Force community. Certainly, other agencies are a critical resource to Unit Liaisons and to the FSC. However, community networks and organizations are important resources for you as well. These networks and organizations include group associations, such as dorm-based and unit-based councils and support groups, as well as clubs, faith communities and organizations in which personnel and families voluntarily participate, including groups for retirees that live in the local area. These networks are an important source of ongoing support for unit personnel and families, and they often spell the difference between strong and weak communities. Moreover, these networks often include "keystone" members of the community—folks that have a reputation for making things happen. Consequently, you should not overlook the value of learning about and establishing relationships with leaders and members of these networks. A listing of these groups and organizations should be part of your assessment (Task 2).

PART 3: GETTING READY TO PERFORM UNIT SERVICE TASKS

The role of the Unit Liaison is to serve as a FSC collaborator and facilitator to unit leaders. Your mission is to partner with these leaders in ways that help them successfully address the needs of the people in their unit. This is a unique role that requires knowledge of particular topics and specific skills. This section of the Guide is designed to help you get prepared to do unit service (i.e., the six tasks described in Part 2 of this Guide). It provides information and tools to help you assess the following before you get started in this role:

- What is important to know
- What is important to believe
- What is important to be able to do.

Once you have made an initial assessment of your knowledge, beliefs, and skills, you will need to take appropriate steps to gain the knowledge and skills to be adequately prepared to perform unit service.

WHAT IS IMPORTANT TO KNOW

In order to be able to work effectively with units, you will need to know the following:

- ✓ Goals of the unit service strategy
- ✓ Service member, civilian personnel and family issues at your base and in your units
- ✓ FSC services and procedures
- ✓ On- and off-base agency services and procedures
- ✓ Military structure and protocols
- ✓ Base mission and leaders
- ✓ Unit mission and leaders
- ✓ Evaluation techniques and result/outcome metrics.

Know the goals of the unit service strategy. The goals of the unit service strategy, which are provided in Part One of this Guide, indicate what you are trying to achieve with each assigned unit. Although it may feel daunting to have the responsibility of assisting leadership in achieving results for unit members and families, being a partner in developing and implementing goals is intended to help you focus on what you are doing with your units. The bottom line is enhancing

unit readiness and performance through working with unit leadership to make a positive difference in the lives of unit members and families.

Know service member, civilian personnel and family issues at your base and in your units. Having an in-depth understanding of unit personnel and family issues (especially with regard to work/life, mission readiness and retention) is critical to being able to: 1) communicate with units, 2) identify potential desired results, and 3) determine how to shape services to address issues effectively. Although one of the first steps in your work with units is to conduct a unit assessment, you will need to have a basic knowledge of unit personnel and family issues before conducting a unit assessment. In this manner, you will be better able to talk with unit leadership and others about unit concerns, strengths and resources. Having an understanding of issues at the base/community-wide level also provides a basis for being able to compare what is going on in your units in the context of the base as a whole. Knowing issues beforehand will enhance your credibility with leadership and gain their trust.

You should have the following types of information at your fingertips about your base and about your units:

- Personnel profiles, including pay grade and household types (single, single parent, married with children, married without children, dual-military couples)
- Deployment patterns and current deployment challenges
- PCS patterns, bases from and to which personnel move, and current PSC challenges
- Family stressors and relational, personal, financial, and health indicators
- Current OPSTEMPO status and work-related stressors and stresses (i.e., unusual duty hours, security procedures).

A number of ways exist to keep up-to-date on what is happening at your Air Force installation. You can read base and Air Force newspapers, talk with FSC and other agencies serving the community about current work/life and community readiness issues, attend town hall meetings and other community forums, meet with personnel from the Military Personnel Flight, monitor Air Force Web sites for data relevant to the command and base, and keep up with the latest Air Force Community Assessment Survey results as they relate to your base community. Your goal is to be an expert on your Air Force community.

Know FSC services and procedures. As a representative of the FSC, you should be fully informed about FSC services and procedures. This is true for several reasons. First, to be able to answer questions and make appropriate referrals for individual cases, you must know what each staff member of the FSC handles and the FSC procedures and forms for particular issues. More importantly, to be able to advise units on how the FSC can help address issues through

either developing or coordinating services, you need to be aware of what the FSC currently offers and potentially could offer. Being familiar with FSC resource materials (e.g., brochures, publications) and resources (e.g., PHP-IDS Web site, Crossroads, FAMNET) are also important because you will need to disseminate these materials and market these resources as appropriate. All of these efforts are critical ways to enhance access to FSC services and resources.

Know on- and off-base agency services and procedures. It is important to know where to locate information about each agency. In all likelihood, the FSC has a directory of community agencies; consequently, it will not be necessary for you to develop your own directory. If you participate in working groups, such as the PHP-IDS or on human services boards in the civilian community, you will have good access to information about the latest developments in the services and procedures of on- and off-base agencies.

Know military structure and protocols. It is essential that you have basic knowledge of the military (especially the Air Force) – its structure, customs, and terminology – in order to work effectively with units and agencies on your base. Knowing military terminology, customs, and rank and insignias is important in order to follow military protocols. Being familiar with readiness, recruitment and retention policies and goals can help you to understand unit leadership and military personnel concerns.

Know base mission and leaders. Units are not isolated from the larger installation and its responsibilities and priorities. Consequently, it is important to know the specific mission and responsibilities of the people and organizations at your base as a context for your work with units. This is often found on the Web sites of the base and the units at your base. In addition to the broader mission or missions, you must understand the military structure and functional areas of responsibility on the base. As part of this, you should know and understand the key responsibilities, names and tenure of the senior leadership at the base, including their command priorities and working styles.

Know unit mission and leaders. If you are going to become a viable member of a unit's team, you must have an understanding of the unit and its mission, including the mission and structure of each unit with which you are working. It would be helpful to know: the organizational structure of each assigned unit; the mission(s), work schedules and deployment patterns of each unit; the members of the unit chain of command (i.e., names, roles and responsibilities, and the length of time in position for commanders, first sergeants and supervisors); and the size and military service representation of unit (i.e., percentage from each Military Service, percentage of active duty, reserve and guard, and civilian personnel). Having this information is important for determining with whom you will be working and how much time you will have before command rotation. Understanding of the unit's work environment, size and demands will also provide some insight into the issues faced by unit personnel and families.

Know evaluation techniques and result/outcome metrics. It is not enough to believe that you are doing a good job as a Unit Liaison and that the unit service plan is having its intended effects. Evaluation is important and you must have knowledge of metrics that allow you to assess the results of the unit service plan. Finding and developing good metrics for results intended is best done as a group activity. At a minimum, you are encouraged to work with other FSC staff members to locate and develop assessment tools and strategies for determining the results from your efforts.

WHAT IS IMPORTANT TO BELIEVE

As stated earlier, one of the goals of the unit service strategy is to shape unit leadership's perceptions about the FSC and their attitudes towards helping service members and families. Your own attitudes will influence your relationship with unit leadership and your ability to work with them effectively. Thinking positively and proactively is essential to achieving success. How strongly you agree with the following three statements will reveal the positive impacts you can make:

- "I can make a difference for my FSC!"
- "I can make a difference for the people in my assigned units!"
- "My Air Force community will be stronger if I am successful!"



**"I CAN make a difference
for my FSC!"**

Because I can:

- ✓ **Perform the unit liaison tasks**, making the quality of the FSC's contact with units multifaceted and more than marketing.
- ✓ **Shape unit and base leadership's views of the FSC** through what I do for units. Having leadership value the FSC and FSC staff is important to me.
- ✓ **Fulfill this role** and thereby enhance my FSC's credibility as a community partner. My role enables the FSC organization to be seen as an agency that is helping to build the installation's capacity for addressing unit personnel and family issues and needs.

“I CAN make a difference for the people in my assigned units!”

Because I can:

- ✓ **Help leaders become better informed about and more skilled in handling family support matters**, which will improve the quality of life for unit personnel and families.
- ✓ **Arrange the delivery of services through the unit** so that unit personnel and families can get the help and support they need.
- ✓ **Promote prevention and early intervention services** that will decrease the incidence and/or severity of problems.
- ✓ **Encourage new ways of thinking about how to address problems and facilitate the use of new strategies** for effectively confronting issues. This is important since individuals often have multiple problems that can rarely be addressed by only one agency or service.
- ✓ **Work with unit leaders to discover ways in which unit personnel and families** can reach out and support one another in managing the demands of military life.

“My Air Force community will be stronger if I am successful!”

Because I am:

- ✓ **Helping to strengthen the capacity of my community** to overcome challenges and achieve our objectives.
- ✓ **Facilitating community organizations working together** to address issues.
- ✓ **Fostering connections between different groups** [i.e., units, agencies (including the FSC), and personnel and families] that will prevent and/or solve problems through stronger community connections.

WHAT IS IMPORTANT TO BE ABLE TO DO

In order to perform the Unit Liaison tasks and responsibilities, you will need to have certain skills and be able to apply your skills in a unit setting. Remember you will be operating in a different setting, so the application of your knowledge and competencies may need to be refined when working in the context of an Air Force squadron or other military unit. The particular aspects of these skills that will be required are highlighted here. For this reason, you will need to examine how well you can do the following:

- ✓ Conduct field interviews
- ✓ Actively listen well to the needs of others
- ✓ Prepare and conduct an effective briefing
- ✓ Manage an effective meeting
- ✓ Conduct a unit assessment
- ✓ Develop priorities and a clear plan that responds to issues
- ✓ Offer FSC services in the unit
- ✓ Monitor service delivery
- ✓ Evaluate activities
- ✓ Network and establish collaborative relationships.

Conduct field interviews. In performing Task 2 (assess unit concerns, strengths and resources), you will need to conduct interviews with different individuals and groups (but most importantly with leadership) to gather information on work/life and readiness issues and unit strengths and challenges. Anthropologists call this process doing “field interviews” since the best way to get good information from people is to meet on their turf. Some of the initial dialogues that you have with leadership in the beginning stages of developing a partnership and planning will seem more like “interviews.” The aim is to get information about leadership concerns and various unit issues (e.g., procedures for handling issues, how leadership within the chain of command communicates and works together, demographics). Thus, you will need to develop the comfort zone and skills to:

- Interview leaders in their offices in the unit
- Interview different levels of leadership from senior commanders to more junior front-line supervisors
- Engage leadership to discuss details they may be reluctant to share or are sensitive about discussing (e.g., their strategies for handling family matters)

- Conduct interviews in which you will be summarizing the information back to leadership.

Actively listen well to the needs of others. Since your role is to partner with leadership and facilitate service delivery, your ability to listen and communicate what you have heard is a critical competency. Interviewing and communicating are often thought of as mostly talking but effective consultation involves mostly listening and processing what you hear. Listening will be important in everything you do. Listening will be key to determining the “true” (and perhaps underlying) messages that unit leaders are trying to convey about their concerns. This will also apply when conducting interviews and informal conversations as well as planning meetings with different groups about issues and service delivery strategies. Thus, in order to help others, you will need to have the ability to:

- Learn to interpret what is said (and not said) (i.e., this means that you can not always take what is said at face value)
- Listen for key phrases (i.e., words and terms used by particular groups). It will be important to paraphrase what is being said as a way of showing your understanding of issues and illustrating a point.
- Rephrase and synthesize information to check your understanding of what is being conveyed
- Watch for the disconnect between what is being said and what is being implied by facial and body gestures and be willing to ask for clarification when you perceive mismatches
- Analyze information to be able to reframe and define issues so that mutual understanding is promoted and assured. This is crucial for making joint decisions about an appropriate service delivery strategy. This is extremely important since your role is to define issues so that some action can take place to address issues.
- Understand the significance of concerns to different groups (but in particular leadership). This is important to being able to define and talk about issues in such a manner that leadership will understand and want to take action. It is also a way to gain credibility and trust with leadership.

Prepare and conduct an effective briefing. You will need to prepare and give briefings to leadership on a number of occasions. You are likely to use briefings to: 1) provide an overview on your role and services, 2) present your assessment and evaluation findings, and 3) provide a status report on service activities. You may also choose to convey information to other audiences (e.g., other Unit Liaisons, FSC staff, and other agency providers) through a briefing format. Thus, you will need to have the skills to:

- Prepare different types of briefings, including overhead/LCD briefs, paper briefs and simple oral briefs with no aids. In each case, this means thinking about what message(s) need to be conveyed in the briefing and choosing and using the appropriate means to deliver your message.
- Prepare briefing documents and conduct briefings for different audiences
- Give briefings to one or two individuals (e.g., leaders) as well as give briefings to large groups in settings outside of the FSC
- Use briefings as a tool to facilitate discussions with leadership (and agencies) about issues and service delivery strategies (i.e., this means briefings will be provided for more than informational purposes)
- Structure the content and presentation of information in briefings to help the audience understand issues and make decisions about next steps (i.e., this means that you have to predict what questions will be asked and what information will need to be provided for decision-making)
- Be prepared to facilitate discussions following the briefing and be able to advise on the next step, if necessary (Tip – it is important to recognize that in working with leadership, you may need to use your skills in persuasion to have your (or other) points considered.)

Manage an effective meeting. Meetings are likely to be a useful and essential method in the unit service process. These meetings will be used to: impart information (e.g., status report on service activities, evaluation results); plan; and discuss and address unexpected problems/issues pertaining to assessment, service delivery, or evaluation tasks. You may also host meetings with other audiences (e.g., other Unit Liaisons, FSC staff, and agency providers) to share information, keep others informed, resolve problems, and discuss and devise service delivery strategies. Thus, you may have both informal and formal meetings with leadership and others. To conduct formal meetings effectively, you will need to:

- Determine how to use meetings to conduct the unit service process effectively (this includes the frequency with which meetings are held, who in the chain of command should attend, the purpose of meetings, what issues commanders want or need to be involved with and any follow-up needed after the meeting)
- Get leadership to attend certain meetings to provide needed support and to elevate the priority of the task at hand (e.g., having a squadron commander talk at a meeting held with front line supervisors to reinforce unit personnel attendance at a service being offered at the unit)

- Prepare meeting agendas and any necessary materials (in a format familiar to and used by the group attending the meeting) (Tip: in certain instances, it may be advisable to send the meeting agenda to leadership for their review prior to the meeting)
- Schedule and conduct meetings in settings outside of the FSC
- Conduct meetings in which your role is to lead and facilitate discussions or decision-making (i.e., you chair the meeting)
- Prepare and conduct briefings (see above)
- Display confidence in front of others (especially leadership and agencies), where appropriate (e.g., to keep meetings on task, to get decisions made)
- Use facilitation techniques (including how to address the potential intimidation created by the presence of a particular leader/individual, how to control domineering attendees, how to get people who have not worked together to collaborate, and how to allow all viewpoints to be heard without losing control)
- Use decision-making techniques (including how to overcome resistance, how to overcome cultural mindset about certain issues, and how should decisions be made/by what process)
- Keep meetings on track (this is particularly important since unit leaders often have limited amount of time available)
- Get honest feedback, particularly from leadership.

Conduct a unit assessment. Task 2 involves conducting assessments to identify unit concerns as well as unit strengths and resources. This assessment involves a number of activities (see Part 2 of this Guide for an explanation of how to conduct this task). To perform this task effectively, you will need to have the ability to:

- Interview and conduct focus groups with different groups (especially unit leaders)
- Develop interview and focus group protocols
- Conduct and manage interviews and focus groups (which includes note taking and writing down verbatim comments during interviews/focus groups)
- Develop and administer questionnaires
- Develop and manage systems for compiling and analyzing questionnaire responses

- Analyze qualitative data (i.e., interview and focus group comments, written comments on questionnaires)
- Prepare a summary of assessment and unit profile data.

Develop priorities and a clear plan that responds to issues. In Task 3 (co-developing a unit service plan), your role is to help leadership determine the appropriate course of action to address issues of concern. This task will entail working collaboratively with leadership to determine priorities, identify results and service delivery strategies, and document these decisions in a written unit service plan so that efforts can be monitored. In order to assist leadership effectively through the planning process, you will need to be able to:

- Develop materials to aid decision-making (see briefing)
- Prepare and provide a proposed list of priorities to leadership based on the unit assessment conducted
- Anticipate information needed to make decisions and be prepared to provide this information during the planning process
- Translate issues of concern into desired results and identify what tasks need to be accomplished in order to achieve desired results
- Help leaders evaluate the feasibility and viability of different strategies and approaches to addressing unit issues and achieving desired results
- Identify potential barriers to the change initiative (cognitive, motivational, resource, and political) and working with others to overcome these barriers
- Develop specific and actionable plans that can be understood by all the parties involved.

Offer FSC services in the unit. A likely component of most unit service plans will be offering FSC services in the unit. Consequently, you will need to be able to:

- Coordinate with FSC staff in the design and delivery of FSC services and activities
- Develop new services and activities that are responsive to unit concerns and issues.

Monitor service delivery. In task 4, you will be responsible for coordinating certain services and working with leadership to ensure activities and services are being provided as outlined in the unit service planning process. You will need to be able to:

- Determine with leadership what activities and/or services need to be monitored

- Work with others, including unit leaders and agency partners, to develop a system for monitoring activities and increasing the accountability of others to the unit service plan. The aim is not to micromanage people's behavior but to ensure that the plan is being implemented and, if not, to determine what needs to be changed. Many reasons exist for why even the best-laid plans fail to be implemented.
- Work with leadership to solve problems that arise (note: this will likely involve having the leadership determine what problems he/she should address and what issues he/she wants you to address; you may also provide assistance to leadership by providing any advice that you feel you are able to give).

Evaluate activities. Task 5 entails evaluating the services and actions implemented to determine whether desired results have been achieved. This can be challenging because it requires at least a minimum level of understanding about evaluation but it is also rewarding to see real results from the good planning and work you will undertake. You will need to invest in gaining some skills in collecting and analyzing data. To be successful in performing this task, you will need to be able to:

- Identify measurement indicators for desired results (i.e., determining what specific data needs to be collected to measure results)
- Determine the appropriate methods for collecting data (i.e., from whom or where do data need to be collected and by what method)
- Collect data and conduct follow-ups as necessary to determine whether results have been achieved
- Develop and manage a system for compiling and analyzing questionnaire responses, feedback and observational data
- Analyze and interpret data
- Prepare a summary of evaluation results.

Network and establish collaborative relationships. The successful Unit Liaison is a force of many, not a force of one. Building and maintaining partnerships will promote sanity and success. There are several reasons for having an established relationship and connection with staff from your own FSC, other on- and off-base agencies, and community groups and organizations (Task 6). For one, you are not alone and solely responsible for providing everything a unit may need. Having a support network will be important for being able to learn from others and get ideas on how to handle any problems/challenges you might face. Having a support network is also critical to arranging and getting the services needed by the units you serve. It helps to reduce duplication of services and efforts. However, all of this requires having

established working relationships and strategies for working with others. Thus, you will need to be competent in and comfortable with:

- Having real partnering relationships with on-and off-base agencies (this includes determining by what means will you be working with others; for example, can work be done through existing forums such as the PHP-IDS and CAIB or do specific work groups/working arrangements need to be set up? You will need to determine what formal and informal arrangements are required)
- Having open and ongoing communication with others. Waiting to the last minute to begin talking with other agency personnel will not create a sense of partnership and cooperation
- Working as a team with other agencies
- Being prepared and knowing how to deal with resistance that may come from other agencies or people who also feel responsible for an area of service or for whom partnering in problem solving has not been part of their history
- Working with community groups and organizations (such as unit support groups, retiree organizations, and spouse clubs).

Assess Your Unit Liaison Readiness

Evaluate how ready you are to serve as a Unit Liaison by responding to the following questions. Honestly rate your readiness by scoring yourself as **(R)** Fully Ready, or **(P)** Partially Ready (still need improvement), or **(N)** Not Ready. Use the answers to identify the areas that most need improvement. Do not serve in this role until most of your answers are R.

How well do you know?

- | | | | |
|---|---|---|--|
| R | P | N | Goals of the unit service strategy |
| R | P | N | Service member and family issues |
| R | P | N | Services and procedures of your FSC |
| R | P | N | Staff and programs of on-base agency partners |
| R | P | N | Staff and programs of off-base agency partners |
| R | P | N | Military structure and protocols |
| R | P | N | My base mission and leaders |
| R | P | N | The mission and leaders of my units |
| R | P | N | Personnel and family profiles for my base and units, including high risk populations/behaviors |
| R | P | N | Work-related stressors and family stressors for base and units |
| R | P | N | Evaluation techniques and results measures |

To what extent do you believe?

- | | | | |
|---|---|---|---|
| R | P | N | I can make a difference for my FSC through being a Unit Liaison |
| R | P | N | I can make a difference for the people in my units |
| R | P | N | My Air Force community will be stronger if I am successful |

How would you rate your abilities to?

- | | | | |
|---|---|---|---|
| R | P | N | Conduct field interviews, especially with unit leaders |
| R | P | N | Actively listen to the needs of others, especially unit leaders |
| R | P | N | Prepare and conduct an effective briefing for unit leaders |
| R | P | N | Manage an effective meeting with unit leaders |
| R | P | N | Conduct a unit assessment of needs and strengths |
| R | P | N | Develop priorities and a clear plan that responds to issues |
| R | P | N | Monitor service delivery |
| R | P | N | Evaluate activities that are part of a service plan |
| R | P | N | Network effectively with other service providers |

Coordinate or provide delivery of service in core FSC areas:

- | | | | |
|---|---|---|--|
| R | P | N | Financial (AF Aid, PFM) |
| R | P | N | Employment (Transition/Career Focus/Volunteer) |
| R | P | N | Relationship development (FLE, I&R) |
| R | P | N | Readiness |
| R | P | N | Relocation |

APPENDIX

Resource Materials:

Sample Unit Service Plan FSC Unit Service Plan Worksheet

Sample Unit Service Plan (a completed FSC Unit Service Plan Worksheet)				
1. Issue: (priority issue from unit assessment: 1 per worksheet page)	2. Desired Results: (measurable results that unit personnel/families will achieve)	3. Who to Involve: (list: FSC, unit CC member, agency, and/or support group)	4. Required Actions: (specific services/actions expected from FSC, unit leaders, agencies, or groups in #3)	5. UL/Cdr. Activities: (specific actions that the FSC & Unit Commander will perform to initiate the required actions)
<i>Junior enlisted personnel are having significant financial problems, including letters of indebtedness and not being able to make credit card payments</i>	<i>Fewer letters of indebtedness having to be prepared</i>	<i>FSC financial assistance</i>	<i>Individual counseling offered to all E1-4 suspected of debt problems or willing to seek help.</i> <i>FSC budget and money management classes offered to dorm residents and married members/spouses.</i>	<i>UL to contact FSC and arrange debt counseling and budget and money management classes in the unit or referrals if appropriate.</i> <i>Cdr. to set aside training time for budget and money mgt. classes</i>
	<i>Less time off work due to financial problems</i>	<i>Unit First Sergeant and Unit Supervisors</i>	<i>Understand how to refer persons for help before difficulties are serious</i> <i>Track E1-E4's to ensure that they participate in FSC budget and money management classes</i>	<i>Cdr. to arrange chain of command meeting on financial issues</i> <i>Cdr. to ensure supervisors attend</i> <i>UL to provide checklist of financial problem warning signs for first sergeant and supervisors use</i>
	<i>Higher percent having a budget to manage their money</i>	<i>Legal Affairs</i>	<i>Provide training on law and debt issues to first sergeants, supervisors and E1-4 personnel</i>	<i>Cdr. to request training from legal affairs</i>

FSC Unit Service Plan Worksheet				
1. Issue: (priority issue from unit assessment: 1 per worksheet page)	2. Desired Results: (measurable results that unit personnel/families will achieve)	3. Who to Involve: (list: FSC, unit CC member, agency, and/or support group)	4. Required Actions: (specific services/actions expected from FSC, unit leaders, agencies, or groups in #3)	5. UL/Cdr. Activities: (specific actions that the FSC & Unit Commander will perform to initiate the required actions)